

## Leading Ways: INFLUENCING UP

### **A BIG CHALLENGE**

One of the trickiest and most necessary of all tasks facing leaders is how to lead up. Many shy away from this work because it strikes them as something that looks like self-promotion, feels a little slimy, or because they are just not good at it. If you are trying to lead by only influencing down or out, then you are a third less effective than if you skillfully work the last dimension: influencing up.

Most leaders do not even think of this as a leadership responsibility or, if they do, it's not theirs but their boss's. But leading up is critical in order to influence your boss and others that are "up" in the organization, and to properly position your work for organizational, team, and individual success.

Here are a few keys for effectively leading up directly to the person you work with and more generally in the organization.

### **BE SELF-AWARE**

This is a valuable place to start in any leadership endeavor, but when leading up there are some special considerations to keep in mind. First is your attitude about leading up. Yes, it probably is your boss's job to get your input, and yes, the higher ups could be clearer about the direction of the organization and more consistent in their actions, but if you are going to influence them, blaming them for their shortcomings and being resentful is not a good place to begin. Rather, think through how to get from them what you need: clarity, a chance for input or consistency, whatever will help you advance your leadership agenda to make the organization better.

### **KNOW THEIR STYLE**

It is essential to be clear about how the up folks like to communicate, receive new proposals, learn bad news and brainstorm. Everyone is different and the more you align how you present it with how they like to hear it, the more successful you will be. You can be too creative when you are leading up, so save that for when you have the opportunity to expand on ideas.

### **YOU NEED TO PUSH**

Working well with others is an important quality for a leader in any organization. But if you are influencing up and hoping to advance ideas you need to actively push this agenda and send a strong message that you are the person who can make this change happen. There are a lot of ideas and a lot of people advancing them, why should the people up in the organization choose you? You are selling, they are buying; the onus is on you to make the case, not for them to understand and value.

## **FRAME IT BIG**

When you have been working on something for a period and are presenting it up in the organization most likely it will be something that you understand better than anyone else. It has become an important part of your life and you want to share all of the details of this with others. They don't care. They assume you know the details and they do not need to, what they want to know is what this will solve, how it fits with the bigger strategy, how it will make things better. And most of these are not in the details. A specific reminder on this point is to not get lost in overly technical language and acronyms.

## **ALIGNMENT**

Everyone in the room has a strategic agenda, key words, pet peeves and some needs to be met. Make sure you have as much knowledge of these dimensions of their preferences as you can possibly gather. And, know who is going to be most engaged and have the most power around your proposal.

## **JUST THE FACTS**

Always have hard numbers around the costs and benefits of the proposal. It is fine to have a best and worst-case scenario, but do not color this in any way. Be objective.

## **STEPPING ON TOES**

Understand the broader political context of your proposal from its impact on other parts of the company to how it will be seen by other individuals not immediately involved. Regardless of how right you are, someone will have to take a political hit when you get the go ahead.

## **RUN IT UP THE FLAGPOLE (but not the one out front)**

Before presenting or even beginning to advance an idea, pressure test it with your staff, others from the outside and senior people who may not be a part of the decision process, but who have good judgment and political sensitivity.

## **GET GRADUAL BUY-IN**

Pre-sell or shop a general concept to test how those that you need to influence will receive it. This will give you intelligence about what they believe are the important issues, current pressures on them, insights into the competition and an early warning on possible objections. It also gives you a chance to enhance relationships with all of them.

## **WELCOME A CONVERSATION**

During the formal presentation it is important to not over-sell, over emphasize your perspective or fail to register the cues you are getting from them. The idea is to get it out in a general way, giving them the pros and cons and then allow them to have the space to explore their concerns with you. Ask for feedback. Engaged questioning is a better sign than uncritical acceptance.

## **Bibliography**

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